



2024 Patient Experience Guidebook

United
Healthcare®

This guidebook covers the following:



The United Heroes program



Why patient experience matters



Resources and best practices to improve patient experience



The importance of annual wellness visits



A checklist to prepare for a positive patient experience



The UnitedHealthcare patient experience survey and scorecard



The Centers for Medicare & Medicaid Services (CMS) surveys: Consumer Assessment of Healthcare Providers and Systems (CAHPS®) survey and Health Outcomes Survey (HOS)



You can be a United Hero

We want to recognize all your hard work in maintaining strong relationships with your patients. That's why we created the United Heroes program — to reward health care professionals for achieving high scores on the patient experience survey.*

If you're able to meet certain targets by the end of 2024, we'll recognize you as a United Hero. The targets fall into 3 categories:

**Getting
needed care**

**Care
coordination**

**Doctor-patient
conversations**

All United Heroes receive a special award for their commitment to delivering excellent patient experiences.

To help support your team in providing great patient experiences, and to learn how to be a 2024 United Hero, order a free Hero Kit by:



- Scanning the QR code
- Or, visiting UHCprovider.com/CAHPSHOS > Become a United Hero > Order now

*CAHPS® is a registered trademark of the Agency for Healthcare Research and Quality (AHRQ).

*For more information about the survey, please see the *Survey scorecard* section.

Great patient experiences make a difference

By working together, we can help ensure that your patients' perceptions surpass their expectations across the continuum of care.



Your patients as partners

Delivering care that is coordinated, managed and continuously improved in active partnership with patients and their care partners is associated^{1,2} with the following benefits:

- Increased patient satisfaction³
- Potential lower costs for the patient
- Increased success in self-management of disease⁴
- Reduced illness burden
- Fewer hospitalizations
- Decreased use of emergency department
- Shorter lengths of stay



Your practice

- Patients are loyal when they feel their health care professional cares about them and delivers a quality experience⁵
- Patient experience initiatives improve employee satisfaction and reduce staff turnover⁶
- A good patient experience correlates with lower malpractice risk^{7,8}



Your payer relationship

- A good patient experience supports a positive experience for our members, as well as health care professionals and their care teams
- Research shows that patient experience surveys are reliable predictors of quality measures, including better outcomes⁹



Getting needed care

Allowing patients the flexibility to make appointments and receive care in a timely manner is one way you can develop and maintain a positive health care experience.



Patient experience survey question	Pre-visit tip	During the visit tip	Close of visit tip
How easy was it to get an appointment with your personal doctor as soon as you needed?	Allow patients to schedule appointments online.	Offer walk-in time slots, telehealth options and/or appointment times outside regular hours.	Schedule the patient's next appointment at the end of their visit.
Did you have any difficulty getting a referral to see a specialist from your doctor?	Confirm that the specialist is accepting new patients before making a referral.	Submit prior authorization requests immediately. Offer the patient an explanation of the referral process.	Schedule patient's specialist appointment at the end of visit. Explain the specialist's role to the patient so they understand which care services the specialist will provide.

Remember to schedule annual care visits

Patients who receive annual care visits (ACVs) tend to give higher scores in the CAHPS survey compared to those who do not.¹ An added bonus — your patients may be eligible to receive rewards for these visits.



Care coordination

Coordinating care among health care professionals helps improve efficiency and shows patients that you respect their time.



Patient experience survey question	Pre-visit tip	During the visit tip	Close of visit tip
<p>Did your doctor seem informed and up to date about the care you received from a specialist?</p>	<p>Ask patients to list their current specialists on their patient portal or to send this information in advance of their visit. If available, gather notes from specialist referrals.</p>	<p>Ask your patients about all the specialists they are seeing. You may be surprised to learn your patients are seeing specialists you're not yet aware of.</p>	<p>Summarize and review specialist information with the patient. Give them a copy of the information they need to take home and post it to the patient portal so it's easily accessible online.</p>
<p>Did your doctor or other health provider review all your prescription medications with you?</p>	<p>Ask patients to bring in their medications or a list of their current medications.</p>	<p>Discuss with patients the medications they are taking, including specialty medications. Listen intently and help simplify the prescriptions the patient is taking by reviewing the name and purpose of each, potential side effects and dosage instructions.</p>	<p>Summarize and review prescription medications with the patient. Give them a copy of the information they need to take home and post it to the patient portal so it's easily accessible online.</p>
<p>Did you receive follow-up from your doctor's office after any blood test, X-ray or other test that you may have completed?</p>	<p>Let the patient know in advance if any tests are planned for their upcoming appointment. Gather results from previous tests that you need to review with them.</p>	<p>Be clear about what tests are being ordered, what they are for, and when and how they can expect results. Let them know if a follow-up appointment will be required.</p>	<p>Summarize and review ordered tests with the patient. Give them a copy of the information they need to take home and post it to the patient portal so it's easily accessible online.</p>



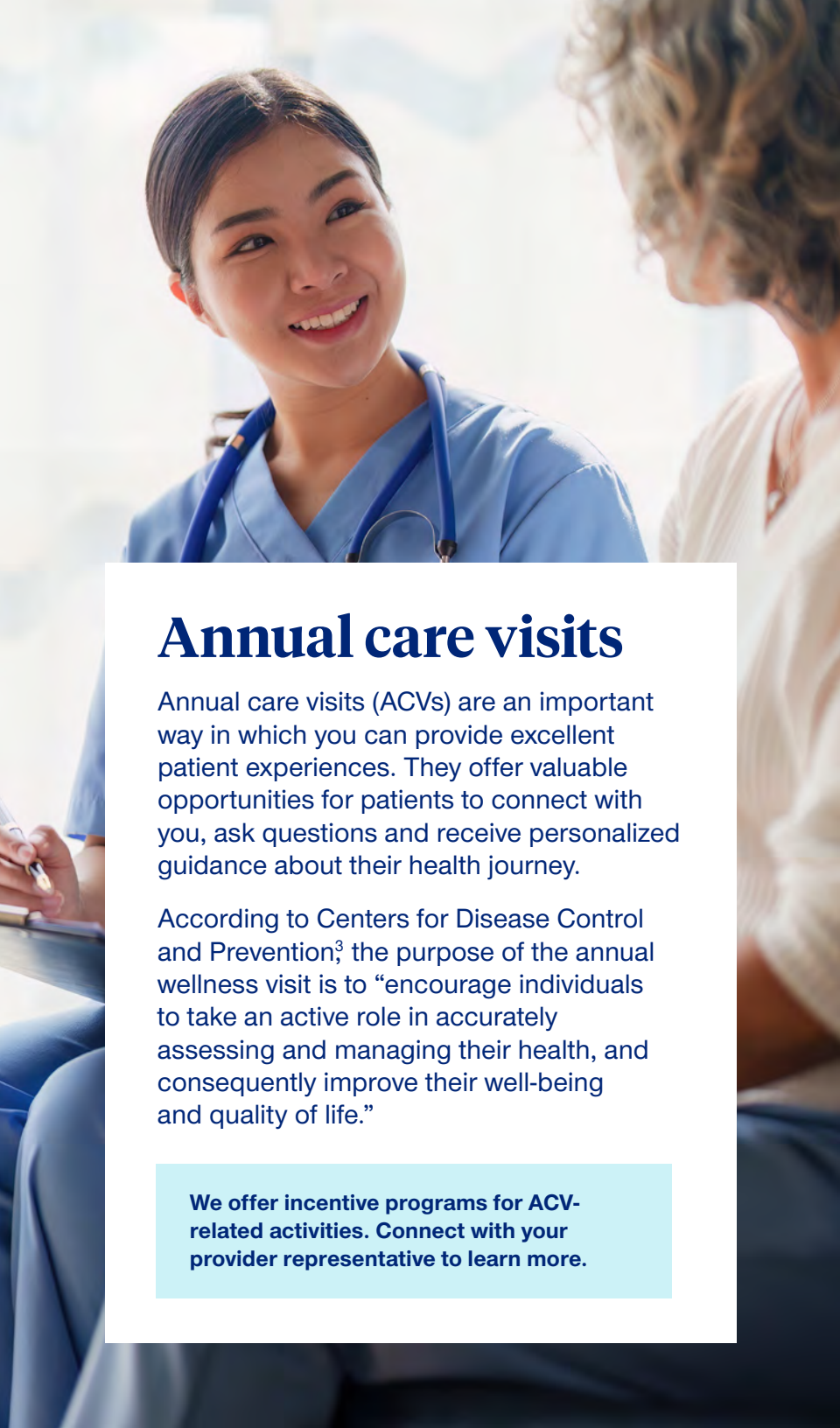
Doctor-patient conversations

Discussing clinical indicators of health with your patients can help you understand their perception of their health and their goals while also building trust to improve their overall well-being.



Patient experience survey question	Pre-visit tip	During the visit tip	Close of visit tip*
Did your doctor or other health provider talk to you about how to prevent falls or treat problems with balance or walking?	Ask all patients to complete a fall assessment in person or prior to their visit.	Ask all patients, regardless of their recent fall history, if they are having difficulty with balance. Display posters and treatment cards and use the checklist to discuss balance, falls and treatment options.	Summarize the discussion and make your recommendations for treatment options clear. These may include using a cane/walker, doing an exercise or physical therapy program or suggesting vision or hearing tests.
Did your doctor or other health provider talk to you about ways to better control leaking of urine?	Ask all patients to complete a bladder control assessment in person or prior to their visit.	Ask all patients if they are having difficulty with urine leakage. Display posters and treatment cards and use the checklist to discuss bladder control, urine leakage and treatment options.	Summarize the discussion and make your recommendations for treatment options clear. These may include bladder training exercises, medication and/or surgery.
During your visit, did your doctor or other health provider advise you to start, increase or maintain your exercise level?	Ask patients to describe their current exercise routine prior to their visit by filling out a form on the patient portal in advance.	Talk to patients about their current exercise routine. Use the wording “start, increase or maintain exercise level” to help with patient recall.	Summarize the discussion and make your recommendations for starting, increasing or maintaining exercise clear.

*Consider using the teach-back method at close of visit by checking the patient’s understanding of what was discussed. This best practice involves asking the patient to state in their own words what they need to know or do about their health going forward. This also gives the patient an opportunity to ask questions and better understand their health.²



Annual care visits

Annual care visits (ACVs) are an important way in which you can provide excellent patient experiences. They offer valuable opportunities for patients to connect with you, ask questions and receive personalized guidance about their health journey.

According to Centers for Disease Control and Prevention,³ the purpose of the annual wellness visit is to “encourage individuals to take an active role in accurately assessing and managing their health, and consequently improve their well-being and quality of life.”

We offer incentive programs for ACV-related activities. Connect with your provider representative to learn more.



On average, patients who receive ACVs tend to give higher scores in the CAHPS survey compared to those who do not.⁴

Important steps

In addition to completing the ACV comprehensive screening, you can do the following with your patients to help improve your patient experience scores:

- Review any specialists or other providers they're currently seeing, including specialist referrals
- Advise them of when and how they'll receive test results
- Discuss medications they're taking, including prescription and over-the-counter medications, supplements and vitamins
- Ask if they've had balance or walking problems and provide treatment options
- Discuss urinary incontinence issues and recommend treatment options
- Review their level of exercise and encourage them to start, maintain or increase physical activity
- Ask about their mental health and if they've experienced any changes since the last visit

Reminder: Medicare covers the cost of ACVs for patients who see network Medicare Advantage providers.

Preparing for positive patient experiences

We encourage you to use this checklist in your patient visit planning. Taking these steps may help you receive high patient experience scores in post-visit surveys.

Pre-visit

1. Gather information and let patients know what to expect

- Provide alternate appointment options (e.g., telehealth, before/after hours or wait list) if it helps them get the care they need, when they need it
- Request patients bring in a list of specialists they're seeing and any prescription or over-the-counter medications they're taking
- Send preappointment reminders by email or phone
- Offer checklists to complete before visit (medical history)
- Set expectations of office wait time

2. Establish a care coordination process

- Obtain and/or order medical records and review them (e.g., lab test results, specialist records and preventive screening results)
- Send medical records to referring health care professionals

3. Prepare for scheduled patients

- Review the next day's appointment at the end of every day, or every morning
- Create patient chart
- Document patient's preferred communication method

4. Use data to help drive the visit

- Incorporate patient information from UnitedHealthcare data platforms into your visit (e.g., Patient Care Opportunity Review (PCOR), PreCheck MyScript® (PCMS) and Practice Assist)

During the visit

1. Provide care

- Review medications
- Review specialist visits
- Provide follow-up lab or test information
- Assess changes in balance, physical activity and bladder control
- Remind patients that they may receive a patient experience survey by email or an automated call after their visit

2. Complete administrative tasks

- Request prior authorizations
- Schedule appointments for specialists or tests and create patient reminders

Post-visit

1. Follow up with patient

- Give patients a post-visit summary to reference
- Communicate delivery method and timing of lab or test results
- Remind the patient they may receive a post-visit follow-up survey
- Schedule any additional specialist visits, labs or tests

2. Post-discharge follow-up

- Call patients after hospitalization to follow up on their medications, reconcile their medications and schedule follow-up appointments

3. Review patient survey results and plan for next visit

- Use the patient experience post-visit survey to help inform areas you could improve

Your patient experience scorecard

In 2024, you must hit the target scores in each of the 3 patient experience categories to become a United Hero.



Review your scorecard results with your UnitedHealthcare representative and care team to identify improvement opportunities.

Survey question	Target score	Month 1	Month 2	Month 3	2024	2023
Getting needed care	93%					
1. How easy was it to get an appointment with your personal doctor as soon as you needed?	89%					
2. Did you have any difficulty getting a referral to see a specialist from your doctor?	96%					
Care coordination	90%					
3. Did your doctor seem informed and up to date about the care you received from a specialist?	89%					
4. Did your doctor or other health provider review all your prescription medications with you?	91%					
5. Did you receive follow-up from your doctor's office after any blood test, X-ray or other test that you may have completed?	89%					
Getting needed Rx	94%					
6. Did you experience difficulty with your insurance plan covering any medications your doctor prescribed?	94%					
Doctor-patient conversations	61%					
7. Did your doctor or other health provider talk to you about how to prevent falls or treat problems with balance or walking?	63%					
8. Did your doctor or other health provider talk to you about ways to better control leaking of urine?	44%					
9. During your visit, did your doctor or other health provider advise you to start, increase or maintain your exercise level?	76%					
Patient experience score	81%					

The latest 3 months will be displayed

The "Getting needed Rx" category helps us detect **opportunities to support your patients**. This score doesn't affect your patient experience score.

Patient experience scores are the average of the sum of positive responses in the 3 categories.

Patient experience = (getting needed care + care coordination + doctor-patient conversations)/3



About the patient experience survey

We want to support you in delivering the best possible patient experiences.

After we receive a claim, we may survey your patient and report your specific results to you through monthly scorecards. Please note that it may take up to 45 days for us to receive a claim and we won't survey your patients more than once every 4 months.

The 9 questions on our patient experience survey relate to the official CAHPS survey and HOS questions that you and your team have the most influence over.

We encourage you to let your patients know that their feedback is important. Please ask them to complete the survey from UnitedHealthcare if they receive one after their visit with you.





The UnitedHealthcare patient experience survey

Scoring will reflect the percentage of positive responses (shown in boxes) for each question.

Getting needed care



1. How easy was it to get an appointment with your personal doctor as soon as you needed?

- Easy
- Somewhat easy
- Not easy
- Does not apply

2. Did you have any difficulty getting a referral to see a specialist from your doctor?

- No difficulty
- It was difficult
- Some difficulty
- Does not apply

Care coordination



3. Did your doctor seem informed and up to date about the care you received from a specialist?

- Yes, my doctor talked to me about care from my specialist
- No, my doctor did not speak to me about care from my specialist
- Did not see a specialist
- Does not apply

4. Did your doctor or other health provider review all your prescription medications with you?

- Yes
- No
- Does not apply

5. Did you receive follow-up from your doctor's office after any blood test, X-ray or other test that you may have completed?

- Yes, received a follow-up
- No, did not receive a follow-up
- Does not apply

Getting needed Rx



This category helps us detect opportunities to support your patients. This target score does not affect your patient experience score.

6. Did you experience difficulty with your insurance plan covering any medications your doctor prescribed?

- No difficulty
- It was difficult
- Some difficulty
- Does not apply

Doctor-patient conversations



7. Did your doctor or other health provider talk to you about how to prevent falls or treat problems with balance or walking?

- Yes
- No
- Does not apply

8. Did your doctor or other health provider talk to you about ways to better control leaking of urine?

- Yes
- No
- Does not apply

9. During your visit, did your doctor or other health provider advise you to start, increase or maintain your exercise level?

- Yes
- No
- Does not apply



What are the CAHPS survey and HOS, and why do they matter?

Each year, CMS sends the CAHPS survey and HOS to some of your patients who are UnitedHealthcare® Medicare Advantage plan members to gather insights into how they feel about their patient experiences. CMS uses a Star Ratings Program to help consumers understand a practice's performance.

In 2024, 38% of health plans' CMS Star Ratings will come from the CAHPS survey (35%) and HOS (3%).

These 2 federally mandated surveys gather patient feedback every year to better understand health care experiences and outcomes. The results provide valuable insights into how consumers perceive their experience with health care professionals and health plans.

Together, we can use these insights to identify areas of improvement and drive better health outcomes.

For more information about the surveys, please contact your UnitedHealthcare representative or visit cahps.ahrq.gov and hosonline.org.

Consumer Assessment of Healthcare Providers and Systems (CAHPS) survey

From March through June each year, a random sample of your patients who are Medicare Advantage members receive the CAHPS survey.

35% of total Star Rating based on CAHPS survey results

CMS survey year 2024 weights *	Measures	Survey questions tied to a patient's experience with health care professional
1	Annual flu vaccine	Have you had a flu shot?
4	Getting needed care	How would you rate your ease and timeliness of: <ul style="list-style-type: none"> • Getting appointments with specialists? • Getting the care, tests or treatment you needed?
4	Getting appointments and care quickly	How often did you: <ul style="list-style-type: none"> • Get urgent care as soon as needed? • Get appointments at your doctor's office?
4	Care coordination Customer service Getting needed Rx drugs	Has your personal doctor or doctor's office: <ul style="list-style-type: none"> • Managed your care among different providers and services to your satisfaction? • Followed up promptly on test results? • Talked to you about all the medications you take?
4	Rating of health care	On a scale from 0 to 10, how would you rate your: <ul style="list-style-type: none"> • Overall health care? • Personal doctor? • Specialist seen most often?
4	Rating of plan	<i>Survey questions not tied to health care professional</i>
4	Rating of drug plan	<i>Survey questions not tied to health care professional</i>

*Measure weights are subject to change based on CMS guidelines. For more information, please visit [cms.gov](https://www.cms.gov).

Health Outcomes Survey (HOS)

From July through November each year, a random sample of your patients who are Medicare Advantage members receive the HOS. Your patients may receive a baseline survey and then a follow up survey 2 years later.

3% of total Star Rating based on HOS results

CMS survey year 2024 weights *	Measures	Survey questions tied to a patient's health outcomes with care provider
1	Fall risk management	<ul style="list-style-type: none"> • Have you had a fall or issues with walking or balance? • When talking with your doctor, have they recommended ways to help prevent falls or treat problems with walking or balance?
1	Management of urinary incontinence	<p>In the past 6 months, have you experienced leaking of urine?</p> <ul style="list-style-type: none"> • How much did leaking of urine make you change your daily activities or interfere with your sleep? • Have you talked with your doctor about treatment options?
1	Physical activity in older adults	<p>In the past 12 months, did you talk with your doctor about your level of exercise or physical activity?</p>
1	Improving or maintaining mental health	<p>During the past 4 weeks, how much of the time have you:</p> <ul style="list-style-type: none"> • Felt calm and peaceful? • Had a lot of energy? • Felt downhearted and blue?
1	Improving or maintaining physical health	<ul style="list-style-type: none"> • Does your health now limit you in daily activities like cleaning, climbing a flight of stairs or playing golf? • In the last 30 days, has pain interfered with your daily activities either at home or work?

*Measure weights are subject to change based on CMS guidelines. For more information, please visit [cms.gov/hos](https://www.cms.gov/hos).

Frequently asked questions

Q: How did you choose the 9 questions on the UnitedHealthcare patient experience survey?

A: We base our 9 questions on measures related to the CAHPS survey and HOS. These questions represent the greatest opportunities for you to identify areas of improvement for your patients.

Q: How do you contact patients for the UnitedHealthcare patient experience survey?

A: We may call your patients up to 3 times. If we don't hear from them by phone, we may send an email.

Q: How did you establish the target scores on the UnitedHealthcare patient experience survey?

A: We use CMS methodology based on past provider patient experience survey performance to determine our target scores. We review our survey target scores annually.

Q: Why do you include Patient Experience survey scores in incentive programs?

A: For 2024, CMS survey measures account for 38% of a provider's overall Star Rating. To help emphasize the importance of these survey measures, we may include them in our provider incentive programs.

Q: Why was the Getting Needed Care question, "How long after your scheduled appointment time did you wait to see your doctor," removed from the UnitedHealthcare patient experience survey?

A: We removed this question to align our survey with the CMS CAHPS survey. For survey year 2024, CMS removed the 15-minute wait time question from the Getting Care Quickly composite.



Q: Why do health care professionals need to be involved with CAHPS and HOS?

A: Health care professionals and their teams heavily influence patient experience, and we want to do our part in supporting you. We've created a suite of educational materials to help set you up for success in achieving excellent patient experience scores and becoming a United Hero.

Q: If the survey response rates for my patients seem low, how can I increase them?

A: There are several reasons why it may appear that you aren't receiving many survey responses, such as:

- We base our survey on claims we receive from your practice. Please note that it may take up to 45 days for us to receive a claim. We won't survey your patients more than once every 4 months.
- We only survey your patients who are Medicare Advantage members. For example, if you serve fewer than 100 of these members, your response rates will be low.
- Your patients who are Medicare Advantage members may benefit from a reminder that they'll receive the survey on a regular basis throughout the year. Encourage your patients to complete a survey if they receive one.

Q: Why is care coordination a focus?

A: The main goal of care coordination is to meet patients' needs and preferences in the delivery of high-quality, high-value health care. This means that the health care professional knows the patient's needs and preferences, and they communicate them at the right time to the right people. This information is used to guide the delivery of safe, appropriate and effective care.¹

Q: The doctor-patient conversations category is harder to achieve and doesn't seem appropriate for every patient visit. Why does UnitedHealthcare include it?

A: CMS asks your patients on the HOS if they've discussed fall risk management and urinary incontinence with their doctor. UnitedHealthcare addresses them as part of the patient experience survey and encourages health care professionals to routinely have these conversations. The targets for this category are lower than the other survey measures.



Endnotes

Patient experience: Why it matters

- ¹ Frampton, S. B., S. Guastello, L. Hoy, M. Naylor, S. Sheridan, and M. Johnston-Fleece. 2017. Harnessing Evidence and Experience to Change Culture: A Guiding Framework for Patient and Family Engaged Care. NAM Perspectives. Discussion Paper, National Academy of Medicine, Washington, DC. <https://doi.org/10.31478/201701f>
- ² Stewart, M.A. Effective physician-patient communication and health outcomes: A review. *CMAJ* 1995; 152(9):1423-33.
- ³ Safran, D.G., Taira, D.A., Rogers, W.H., et al. Linking primary care performance to outcomes of care. *J Fam Pract* 1998; 47(3):213-20.
- ⁴ Sequist, T.D., Schneider, E.C., Anastario, M., et al. Quality monitoring of physicians: Linking patients' experiences of care to clinical quality and outcomes. *J Gen Intern Med* 2008; 23(11):1784-90.
- ⁵ Safran, D.G., Montgomery, J.E., Chang, H., et al. Switching doctors: Predictors of voluntary disenrollment from a primary physician's practice. *J Fam Pract* 2001; 50(2):130-6.
- ⁶ Rave, N., Geyer, M., Reeder, B., et al. Radical systems change: Innovative strategies to improve patient satisfaction. *J Ambul Care Manage* 2003; 26(2):159-74.
- ⁷ Levinson, W., Roter, D.L., Mullooly, J.P., et al. Physician-patient communication: The relationship with malpractice claims among primary care physicians and surgeons. *JAMA* 1997; 277:553-9.
- ⁸ Hickson, G.B.C., Clayton, E.W., Entman, S.S., et al. Obstetricians' prior malpractice experience and patients' satisfaction with care. *JAMA* 1994; 272:1583-7.
- ⁹ Cleary, P.D. Evolving concepts of patient-centered care and the assessment of patient care experiences; optimism and opposition. *JHealth Polit Policy Law* 2016; 41(4):675-96.

Patient experience tips and best practices

- ^{1,4} UnitedHealthcare (2023). Provider Care CAHPS Measures. Internal UnitedHealthcare report: unpublished.
- ² Frampton, S. B., S. Guastello, L. Hoy, M. Naylor, S. Sheridan, and M. Johnston-Fleece. 2017. Harnessing Evidence and Experience to Change Culture: A Guiding Framework for Patient and Family Engaged Care. NAM Perspectives. Discussion Paper, National Academy of Medicine, Washington, DC. <https://doi.org/10.31478/201701f>
- ³ Goetzel, RZ; Staley, P; Ogden, L; Stange, P; Fox, J; Spangler, J; Tabrizi, M; Beckowski, M; Kowlessar, N; Glasgow, RE; Taylor, MV. A framework for patient-centered health risk assessments – providing health promotion and disease prevention services to Medicare beneficiaries. Atlanta, GA: US Department of Health and Human Services, Centers for Disease Control and Prevention, 2011. <https://www.cdc.gov/policy/paeo/hra/FrameworkForHRA.pdf>

Frequently asked questions

- ¹ Care Coordination. Content last reviewed August 2018. Agency for Healthcare Research and Quality, Rockville, MD. <https://www.ahrq.gov/ncepcr/care/coordination.html>

We're here to support you

For more patient experience resources,
visit UHCprovider.com/CAHPHOS
or connect with your UnitedHealthcare
representative.

To access our self-paced
interactive course, please visit
UHC.com/patientexperience.